

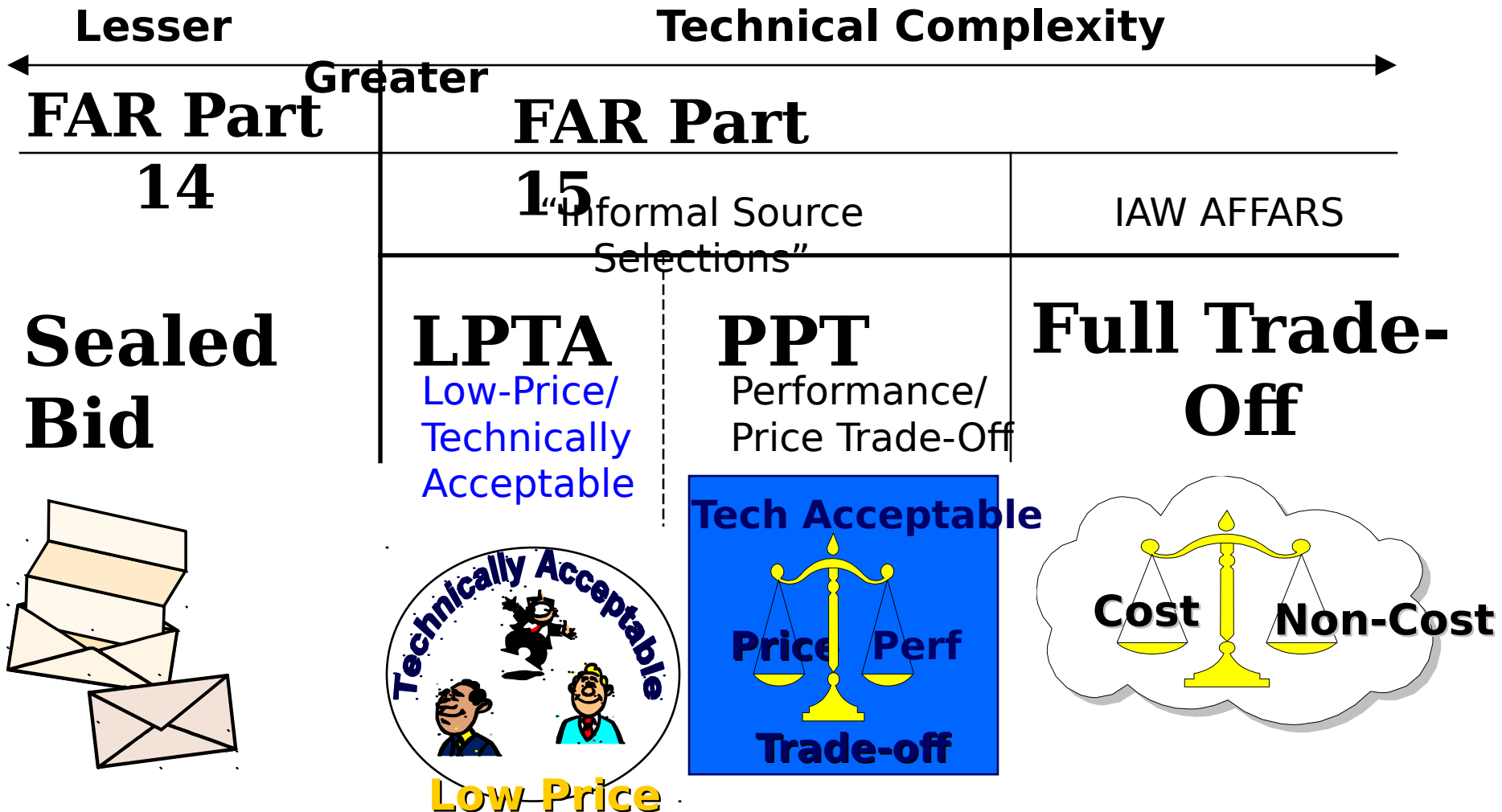
SOURCE SELECTION TRAINING



Rhonda Provence
OC-ALC/PKCA
Source Selection Advisor
734-6181
Rhonda.Provence@tinker.af.mil

Diane Kalousdian
OC-ALC/PKCA
PRAG Chair
739-7787

The Best Value Continuum



Pre-Solicitation Highlights



- Dollar amount dictate events
 - Basic Procedures - SAT (\$100K) - $< \$10M$
 - Median Procedures - $\geq \$10M$ - $< \$100M$
 - Agency Procedures - $\geq \$100M$
- Main Focus:
 - Median Procedures
- Source Selection Information must be marked accordingly.

Pre-Solicitation Highlights

- Requirements Identified
- Market Research “Begins”
 - Talking to Industry
 - Requirements Refined
 - Determining Contract type and period of performance, warranties, subcontracting info, cost/price, etc
- Strategy Group Meeting (SGM) >\$5M

Pre-Solicitation Highlights Cont'd



- Acquisition Strategy Panel (ASP) (\$15/30M)
 - Planned acquisition approach described
 - | Contract Type (FFP, FPAF, CPIF etc)
 - Period of Performance
 - Commercial FAR Part 12
 - Negotiated FAR Part 15 “Best Value” Source Selection
 - Approval requested.
- Acquisition Plan (review/approval process begins)

Pre-Solicitation Highlights Cont'd



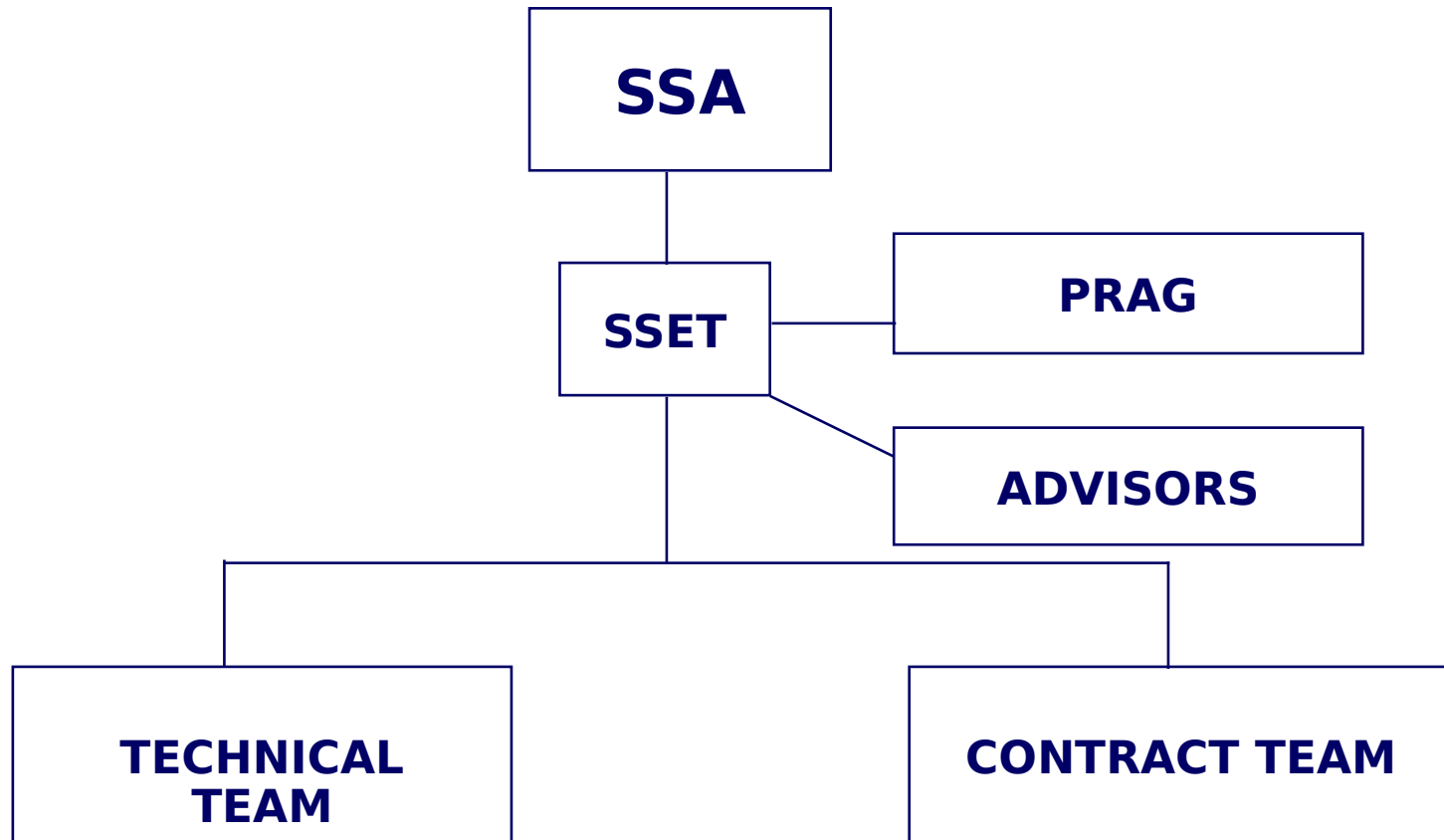
- Sources Sought Synopsis Publicized (Market Research)
- Technical Requirements Document Drafted
- Risk Assessment Accomplished
 - Critical Discriminators Identified
 - Statement of Objectives Written
- Evaluation Factors/Subfactors Identified
 - Mission Capability - with at maximum of six subfactors
 - Past Performance
 - Proposal Risk
 - Cost/Price

Pre-Solicitation Highlights Cont'd



- Source Selection Plan (SSP) (drafted)
 - Teams Identified
 - Evaluation Methodology
 - Evaluation Factors
 - Section M

SAMPLE ORGANIZATION



Pre-Solicitation Highlights Cont'd

- Section L - Instructions, Conditions, and Notices to Offerors written
- Section M - Evaluations Factors for Award written

Section L- Instructions, Conditions, and Notices to Offerors



- Informs contractors how to propose in response to the solicitation
- What format and organization
- Information to include in proposals
- Restrictions
 - | Page size, format and number limitations
 - Volumes - Executive Summary, Tech Proposal, Oral Presentation Slides, Contract Documentation, Past Performance, Pricing

Section L


Cont'd



■ Restrictions continued

- Technical Medium to utilize (3x5 virus free diskettes, CD, Windows 97, 97, Excel or etc)
- Past performance:
 - Instructions who to return the completed questionnaires
 - How many years to go back - 3, 5, 10, etc.
 - Recent and relevant contracts and POCs

Section M - Evaluations Factors for Award



- Approved in Source Selection Plan
- Tells contractor how their proposals will be evaluated.
 - Lists factors
 - Specifies order of importance
 - Describes methodology of the evaluation
 - colors
 - proposal risk
 - performance confidence

Pre-Solicitation Highlights Cont'd



- Draft Request For Proposal (DRFP) (Market Research)
 - Industry Questions Submitted to CO
 - Presolicitation Conference (Market Research)
 - Questions and Answers reviewed with industry
 - Minutes published
- Requirements and Solicitation updated/finalized
- Acquisition Plan and Source Selection Plan Finalized, Reviewed and Approved

Pre-Solicitation Highlights Cont'd



- Senior Level Review, Legal Review and Policy Review of Formal Solicitation
- Approval to issue Formal Solicitation Requested and Granted
- Solicitation Issued and Published on Internet
- Notification of Source Selection issued by Contracting Officer - CO is sole point of contact
- Source Selection Certifications Signed by everyone assigned to team

Preparation for Evaluation of Proposals



■ Teams must be familiar with:

■ Evaluation Forms

- Rating Team Worksheet

- Evaluation Notice (EN)

■ Ratings:

- Color, Proposal Risk, Performance Confidence Definitions

■ Understand Exchanges:

- Clarifications, Communications or Discussions (FAR 15.306)

Preparation for Evaluation of Proposals Cont'd



- Color ratings depict how well the proposal meets the mission capability subfactors
 - Strengths
 - Proposal Inadequacies
- Proposal Risk assess the risks associated with a proposed approach as it relates to the mission capability subfactors
 - Weakness
 - Deficiencies

Preparation for Evaluation of Proposals Cont'd



■ Past Performance

- Past Performance Confidence Ratings
- Recent
- Relevant
- Present/Past
- Questionnaires
- CPARs

□ Cost/Price

- Complete
- Realistic
- Reasonableness

Receipt of Proposals

- CO Received Proposal(s)
 - Count pages and volumes
 - Assign Alpha Symbol
 - Offeror A, B, C etc
- Do not discuss source selection with anyone
- Each team member begins by reading the entire proposal
 - Make memory jogging notes as you read.

Evaluation of Proposals

- Each proposal must be evaluated individually against only the Evaluation Factors
 - Warning: Do not evaluate proposals based on who the contractor is. Forget what you know about a contractor, who you know, and what you have heard about a contractor.
- Offerors are not evaluated against each other
- All Proposal must be evaluated initially - NO SHORTCUTS

Evaluation of Proposals



- Evaluation and documentation of first proposal must be completed prior to evaluation of subsequent proposals.
- Consistency must be maintained
 - The same person who evaluates a certain subfactor, evaluates the same subfactor on every proposal.
- Teams must come to a consensus on ratings and ENs.
 - The teams must have periodic meetings to discuss evaluation findings (Strengths, weaknesses, deficiencies)

Rating Team Worksheet

RATING TEAM WORKSHEET

OFFEROR: _____

☐ INITIAL EVALUATION

☐ FINAL EVALUATION

MISSION CAPABILITY PROPOSAL ASSESSMENT: ☐ BLUE (Exceptional) ☐ GREEN (Acceptable) ☐ YELLOW (Marginal) ☐ RED (Unacceptable)

NARRATIVE (Include strengths and proposal inadequacies): (Explain how proposal exceeds or fails to meet performance capability. If exceeds explain how it benefits the Air Force.)

PROPOSAL RISK: ☐ LOW ☐ MODERATE ☐ HIGH (Indicate risk rating of low, moderate, or high for each subfactor or element, if used and weaknesses)

Rating Team Worksheet

Cont'd



PAST PERFORMANCE: ☐ HIGH CONFIDENCE ☐ SIGNIFICANT CONFIDENCE ☐ CONFIDENCE
☐ UNKNOWN ☐ LITTLE CONFIDENCE ☐ NO CONFIDENCE

NARRATIVE:

PRICE/COST:

TOTAL PRICE/COST \$_____

NARRATIVE:

EXCHANGES WITH OFFERORS

SIGNATURE (Contracting Officer)

SIGNATURE (Technical)

Evaluation Notice (EN)

Evaluation Notice

___ FAR 15.306(a) Clarification

Offeror _____

___ FAR 15.306(b) Communications

Control # _____

___ FAR 15.306(c) Discussions

___ Deficiency

GOVERNMENT COMMENT:

Factor

Subfactor

Element

Evaluation Notice (EN)

Cont'd



REFERENCE: *(Specify offeror's document, paragraph and page number)*

SUMMARY: What is the impact to the acquisition if the EN is not resolved by the offeror's response or if no response is received? Include references to the solicitation if necessary to support the EN.

EVALUATOR:

OFFEROR RESPONSE:

EVALUATOR ASSESSMENT OF OFFEROR RESPONSE: Address impact (including impact on offeror ratings, if any) and evaluate response.

SIGNATURE (Contracting Officer)

SIGNATURE (Program Manager)

EXERCISE



- The following charts will be used for the exercise

Order of Importance for A-76 Education & Training

3.0. Evaluation Factors and their Relative Order of Importance. Selection of the best value contractor will be made to the offeror proposing the combination most advantageous to the Government based upon an integrated assessment of the evaluation factors and subfactors described below. The evaluation factors are listed in equal order of importance. Within the mission capability factor, the subfactors are listed in descending order of importance.

Factor 1 – Mission Capability

Subfactor 1.1. – Program Management

Subfactor 1.2. – Manpower

Subfactor 1.3. – Quality Control

Factor 2 – Past Performance

Factor 3 – Proposal Risk

Factor 4 – Cost/Price

3.1. Importance of Cost/Price. In accordance with FAR 15.304(3), the evaluation factors other than cost or price, when combined, are significantly more important than cost or price; however, cost/price will contribute substantially to the selection decision.

Evaluation Factors



- 3.5. Factor 1 - Mission Capability. Each subfactor within mission capability will receive one of the color ratings described in AFFARS 5315.305(a)(3)(i), based on the assessed strengths and inadequacies of each offeror's proposal as they relate to each of the mission capability subfactors. Subfactor ratings shall not be rolled up into an overall color rating for the mission capability subfactor. In arriving at a best value decision, the Government reserves the right to give positive consideration for performance in excess of threshold (minimum) requirements.

Subfactor 1.1. – Program Management



3.5.1. Subfactor 1.1. – Program Management

Offerors will be evaluated on their proposed approach for planning, controlling, directing, and managing the provisions outlined within the PWS. The threshold (minimum) is met when the proposed approach includes and describes all of the following:

- a) Innovations and efficiencies that will be implemented in support of requirement
- b) Declaration statement to acknowledge and accept, without exception, all work requirements
- c) Approach for performing Specific Tasks as detailed in PWS Section C-5, paragraphs 5.2. Administrative Services, 5.3. Computer Systems and Database Administration, 5.4. Military Education Services, 5.5. Training General, 5.6. Training Brokerage, 5.7. Distance Learning, 5.8. Formal Training Function, 5.9. Base Training Management, 5.10. Functional Training, and 5.11. Mobility, Deployment, Disaster Preparedness, Emergencies, Exercises, and Other Contingencies and validation that management has the technical expertise to manage the Specific Tasks
- d) Description of internal procedures that insures support of requirement (e.g., management reviews, controls, or reports)
- e) Explanation of how action items resulting from these procedures will be resolved
- f) Approach for insuring personnel accreditation is kept current and valid
- g) Plan for Subcontracting and/or Teaming Support if anticipated
- h) System for control, accountability, and security of all Government property, facilities, documents, and technical data (ref. PWS Section C-1, para. 1.2.3. Security Requirements and 1.5. Physical Security)
- i) Transition approach for assuming responsibility from the existing work force to ensure continuity of operations and to ensure that all Education and Training functions will be fully operational at contract performance start date (ref., PWS Section C-1. paragraph 1.13., Orientation Period, and TE-10, Transition Plan)


Subfactor 1.2. – Manpower

3.5.2. Subfactor 1.2. – Manpower

Offerors will be evaluated based upon their manpower methodology approach to ensure that the services within each specified requirement of the PWS are provided. PWS requirements include, but are not limited to, Administrative Services, Computer Systems and Database Administration, Military Education Services, General Training, Training Brokerage, Distance Learning, Formal Training Function, Base Training Management, and Function Training. The threshold (minimum) is met when the proposed approach includes and describes all of the following:

- a) Manpower methodology to include manning requirements
- b) Documentation for all key personnel (e.g., on-site contract manager, alternate(s), functional supervisors(s)/manager(s)). This includes describing and providing documented skills, experience, job descriptions, education, supervisory experience and responsibilities, current and valid professional certifications, license and credentials (ref. PWS Section C-1, para. 1.2 Contractor Personnel) for managing complex education and training function similar in size and scope to the requirement
- c) An outline expressing the utilization (full-time [40 hours per week], part-time, and temporary employees) of personnel
- d) Evidence of qualification requirements for personnel as detailed in PWS Section C-1, paragraphs 1.2.1., Contract Manager and 1.2.2., Contractor Employees, and subsequent subparagraphs
- e) Approach for sustaining proposed manpower levels during the contract performance period
- f) If cross utilization is anticipated, provide detailed rationale, approach, and use
- g) Concise organization chart with rationale that reflects offeror's proposed organizational composition through all levels, to include defined responsibilities for each specified requirement (see L-800)
- h) Hiring approach to ensure full manning, to include security clearances/badges and training, be in place at contract start date (ref., PWS Section C-1, paragraph 1.13., Orientation Period, and TE-10, Transition Plan)

Subfactor 1.3. – Quality Control



3.5.3. Subfactor 1.3. – Quality Control

Offerors will be evaluated based upon their proposed approach to Quality Control and the submittal of a feasible Quality Control Plan suitable as a compliance document upon award. The Quality Control Plan will be evaluated based upon the proposed approach of accountability for all work. The plan should include, but not be limited to, the areas identified in PWS Section C-1, paragraph 1.3. The threshold (minimum) is met when the proposed plan includes and describes all of the following:

- a) Procedures for interfacing with Government representatives (i.e., Quality Assurance Evaluators, Contract Administrators, and COs)
- b) Approach for surveillance of work acceptance and rejection of work, and how it will be documented
- c) Approach for rejection of work resolution
- d) Approach to requirements listed in the Quality Assurance Surveillance Plan (QASP)
- e) Proposed quality control and inspection organizational structure
- f) Identification of all management/supervisory quality positions
- g) Identification of the functional areas to which all quality control and/or inspection personnel (at all levels) will be assigned
- h) Description of the internal feedback system and lines of authority for quality control personnel
- i) Description of how performance will be measured for quality and deficiencies corrected.

Technical Proposal



- Offeror A - Subfactor 1.1- Program Mngt:
- As ABC contractor approach for subfactor 1.1 includes everything, but:
 - (f) Approach for ensuring personnel accreditation does not entail currency.
 - (I) Transition approach does not fully ensure that all functions will be fully operational at contract start date.

Technical Proposal



- Offeror A - Subfactor 1.2- Manpower:
- As ABC contractor approach for subfactor 1.2 includes everything, but:
 - (a) approach for manning requirements is somewhat less than expected (example: expect 50 people, ktr proposed 25). Their approach is detailed and convincing.
 - (b) Not all of the “documentation” was received on the the key personnel.
 - (h) Hiring approach levies much of the security clearance requirements on the government process. (How long does it take for the government to process security clearances after the contractor submits the proper paperwork? Can we process the paperwork within the orientation period?)

Technical Proposal



- Offeror B - Subfactor 1.1- Program Mngt:
- As XYZ contractor approach for subfactor 1.1 includes everything, but:
- (a) Innovations and efficiencies were not clearly identified or we did not recognize that they were innovations. Their approach was clear and convincing and based on how they have always done business.
- (I) Transition approach relies on government's transition obligations to move out on time.

Technical Proposal



- Offeror B - Subfactor 1.2- Manpower:
- As XYZ contractor approach for subfactor 1.2 includes everything, but:
 - (a) approach for manning requirement is somewhat higher than expected (example: expect 50 people, ktr proposed 75). Their approach is detailed and convincing.
 - (b) Not all of the “documentation” was received on the the key personnel.
 - (h) Hiring approach levies much of the security clearance requirements on the government process. (How long does it take for the government to process security clearances after the contractor submits the proper paperwork? Can we process the paperwork within the orientation period?)

Technical Proposal



- Offeror C - Subfactor 1.1- Program Mngt:
 - As DK contractor (Diane's Company) approach for subfactor 1.1 includes everything, but:
 - (c) Approach for performing Specific Tasks did not include PWS Section C-5, para 5.3. Computer Learning, 5.5. Training General. Their approach was clear and convincing. You are familiar with this company and know that they can do it and actually accomplished these same tasks on a previous contract that you were assigned. You have a "great" working relationship with Diane.
 - (I) Transition approach relies on government's transition obligations to move out on time.

Technical Proposal



- Offeror C - Subfactor 1.2- Manpower:
- As DK Company (Diane's Company) contractor approach for subfactor 1.2 includes everything, but:
 - (a) Approach for manning requirement is a little higher than expected (example: expect 50 people, ktr proposed 60). Their approach is not detailed or convincing.
 - (b) Not all of the “documentation” was received on the the key personnel. But you know she has it because you saw it in another SS Evaluation.
 - (h) Hiring approach levies some of the security clearance requirements on the government process. (How long does it take for the government to process security clearances after the contractor submits the proper paperwork? Can we process the paperwork within the orientation period?)

Exercise



- FIRST: Teams break out and fill out Rating Team Worksheet for each subfactor and any Evaluation Notices.
- Assumption: Factor 1.3 Quality is Green/Low Risk.
- Assume prices are reasonable:
 - | Offeror A - \$25M
 - Offeror B - \$20M
 - Offeror C - \$23M

INITIAL EVALUATION

SUBFACTOR		1.1	1.2	1.3	PAST PERF	
		PRICE				
OFFEROR A				G	CONFIDENCE	\$25M
	PROP RISK			L		
OFFEROR B				G	CONFIDENCE	\$20M
	PROP RISK			L		
OFFEROR C				G	CONFIDENCE	\$23M
	PROP RISK			L		

Exercise



- SECOND: Each team presents their individual findings, narrative, ratings along with rational, strengths/proposal inadequacies, weaknesses, deficiencies and any ENs for each subfactor.
- THIRD: All Teams get together in one group and come to consensus concerning ratings, narrative, strengths/proposal inadequacies, weaknesses, deficiencies and any ENs for each subfactor.

Past Performance

A thick, horizontal yellow brushstroke that spans the width of the slide, positioned directly below the title.

Diane Kalousdian
PRAG Chairperson

Past Performance



- Performance risk assessment
- Performance confidence ratings
 - Exceptional/High Confidence
 - Very Good/Significant Confidence
 - Satisfactory/Confidence
 - Neutral/Unknown Confidence
 - Marginal/Little Confidence
 - Unsatisfactory/No Confidence

Past Performance Cont'd



- Experience Versus Past Performance
 - Experience reflects **whether** contractors have performed similar work before. (This relates to the relevancy issue.)
 - Past Performance describes **how well** contractors performed the work.
- Focus: Recent and Relevant Contracts

Past Performance Cont'd



□ Evaluation Process

- Entire Performance Risk Assessment Group (PRAG) needs to assess all offers and assign performance confidence ratings. (DO NOT divide into groups and have separate people evaluate different offerors.)
- Note Positive and negative aspects of the offeror's past performance.

Past Performance Cont'd



- Data received comes from reputable and reliable sources
- Utilizing Information from Previous solicitations
 - Information must still be recent and relevant to apply it to current source selection
- All information obtained concerning a contractor's past performance is source selection sensitive information

Past Performance Cont'd



- Contractors must be provided the opportunity to comment on adverse past performance information
 - Only when the contractor has not been provided the opportunity to previously address
 - Considered Clarifications

Past Performance Cont'd



- Past Performance Analysis
 - Clear
 - Reasonable
 - Rational

Past Performance Evaluation



□ Past Performance Scenarios:

- Number 1: What if XYZ Company has a satisfactory past performance record EXCEPT for the area of subcontract management? On the current effort he is not proposing the use of any subcontractors. Do you still consider this negative subcontract management issue in his performance confidence rating?

Past Performance Evaluation Cont'd

- Past Performance Scenarios:
 - Number 2: What do you do if you receive past performance questionnaires for XYZ Company filled out by Mr. Barney, and you find out that Mr. Barney works for ABC Company which is the current teaming partner (or major subcontractor) to XYZ Company. What do you do?

Past Performance Evaluation Cont'd

□ Past Performance Scenarios:

- Number 3: A past performance problem has been identified through an Evaluation Notice sent to ABC company. In response the contractor tells you that he has enacted a new company policy that has corrected this problem. Do you give him credit for correcting the problem or do you still consider this negative information in his performance confidence rating?

Past Performance Evaluation Cont'd



□ Past Performance Scenarios:

- Number 4: .What do you do if you get an offer from a company that has done a great deal of business with the government but it has been mostly in computer support equipment and training related to computer equipment? Is this relevant enough to the current Education and Training A-76 requirement?

Past Performance Evaluation Cont'd



□ Past Performance Scenarios:

- Number 5: What if two contractors have equally good past performance, but one of them has very relevant past performance and the other one has only semi-relevant past performance. Should they get the same performance confidence rating?

Oral Presentations



- Augment the written proposal
- Specified presenters:
 - corporate executives
 - key project personnel
- Specified topics:
 - Describe knowledge of the requirement
 - Demonstrate understanding of the program objectives
 - Describe related and relevant past experience

Competitive Range Determination



- Contractors are being excluded from competitive range
- When in doubt leave them out.
- Contracting Officer makes the competitive range determination and presents the information to SSA for approval.

Exchanges

After Receipt of Proposals



- Clarifications, Communications or Discussions
- Adverse Past Performance Information - Contractors must have an opportunity to address (considered communications).
- After competitive range has been established and with expectation of receiving proposal revisions
 - SSA approval must be obtained to release ENs
 - Release of ENs that will result in proposal revisions.

Discussions



- Offerors Respond to ENs
- Offerors Response is Evaluated
- Determine if issue is resolved or if further discussions are required.

Clearance



- After discussions.
- Policy Review
- Legal Review
- All documents are up to date as of discussions including Price Competition Memorandum (PCM).
- All aspects of the evaluation are presented to the SSA, Clearance is requested and hopefully approved.

Request for Final Proposal Revision




- Clearance Approval constitutes approval to issue Final Proposal Revisions
 - Consider Interim release of rating status

Receipt of Final Proposal Revision



- Final Proposal are received
- Final Evaluation is accomplished.
 - Entire proposal should be evaluated - Again.

Final Evaluation Results and Decision



- All documents are completed.
 - Proposal Evaluation Report (PER) (Basic)
 - Briefing Charts in detail can be PAR for Median SS.
 - | However, can request the use of PAR for Median in SSP.
 - Proposal Analysis Report (PAR) (Agency)
 - Price Competition Memorandum (PCM)
- Model Contract
- Decision Briefing Charts
- Decision Document

Final Evaluation Results and Decision



- All documents are reviewed by
 - Legal
 - Policy
 - SSET Chairs

Decision Briefing



- The Final Evaluation Results are briefed to the SSA.
 - Color
 - | Strengths, Proposal Inadequacies,
 - Proposal Risk
 - | Weaknesses, Deficiencies
 - Past Performance Confidence
 - Positive/Negative Aspects
 - Cost/Price
 - Completeness, Reasonable, Responsible,

FINAL EVALUATION

SUBFACTOR	1.1 PRICE	1.2	1.3	PAST PERF	
OFFEROR A	G	G	G	EXCEPTIONAL/ HIGH CONFIDENCE	\$25M
PROP RISK	H	H	M		
OFFEROR B	G	G	G	SATISFACTORY/ CONFIDENCE	\$20M
PROP RISK	L	L	L		
OFFEROR C	B	G	G	NEUTRAL/ UNKNOWN CONFIDENCE	\$23M
PROP RISK	L	L	M		

After Decision A-76 Tailored



- Notifications to Unsuccessful Offerors
- Ktr has 3 days to request Debriefing in writing
- CO has 5 days to schedule Debriefing
- Debriefings held with contractors
- Protest Period 10 days after debriefing

After Decision A-76 Tailored



- Selected Contractor's proposal compared to Most Efficient Organization(MEO).
 - MEO can be updated
- If MEO is selected, acquisition is dissolved.
- If selected contractor's proposal is selected, award processed.
- Funding is required prior to commencement of work.
- Lessons Learned

THE END



- Contract Performance begins IAW contract.
- Any Questions??